

CLV Interim DM System User's Guide

This user's guide addresses the Windchill Interim Data Management (DM) workflow system, which is presently being used in CLV. The purpose of this system is to provide a process for distributing, reviewing, updating, and approving CLV documents. In order to use this system:

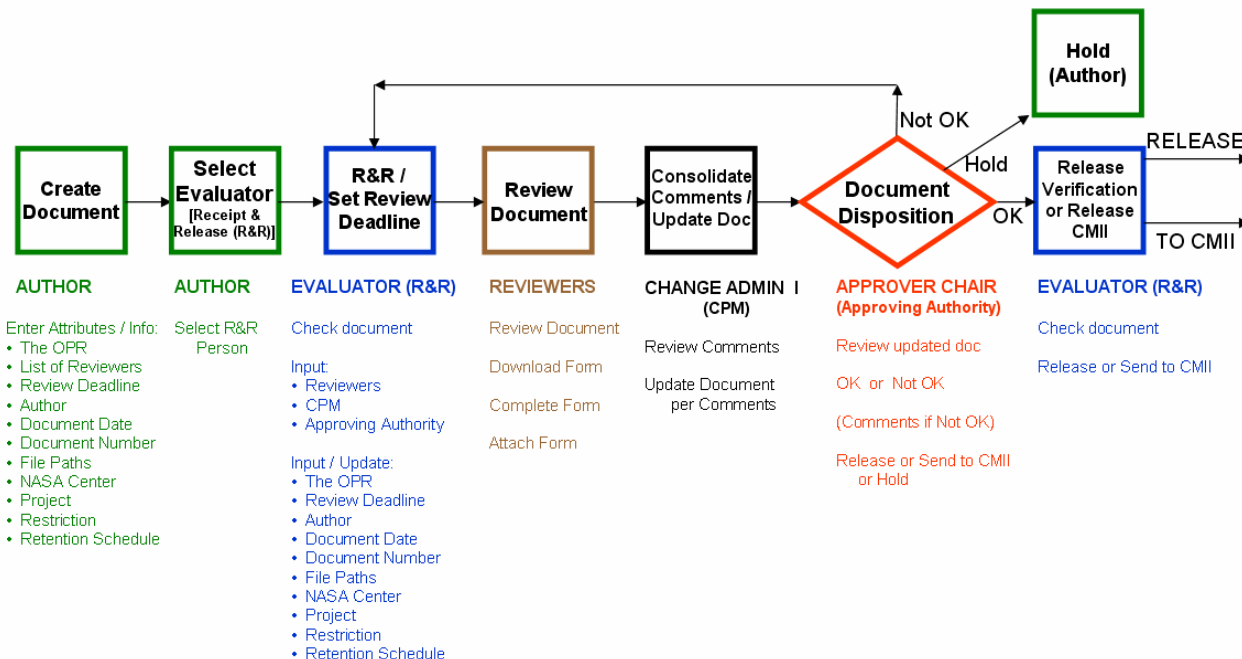
- It is necessary to have an Integrated Collaborative Environment (ICE) account, which is the same as a Windchill account.
- It is necessary to be invited to the Windchill CLV Product.
- It is also necessary to perform a browser configuration, whether using a PC or a Mac. If you already have an ICE account, browser configuration instructions may be found on the ICE Portal, <https://ice.exploration.nasa.gov/iceportal/servlet/portal/action/ESMDLoginUser>

Contact a member of the Information Technology (IT) Team for assistance with any of these items; contact information provided below.

IMPORTANT: If you encounter any problems or have any questions about this workflow, please contact a member of the IT Team:

The ICE Helpdesk – 1-866-419-6297 or
(b)(4) 256-541-2530 or
(b)(4) -520-9639

A flow diagram of the Interim DM process steps and roles is presented below:



This workflow may be used in CEV and Cx in the near future.

There are five CDM roles represented in this workflow: Author, Receipt and Release, Reviewer, Change Package Manager (CPM), and Approving Authority. The following table shows the CDM role names, the attendant Windchill role names, and the pages in this manual that pertain to each role:

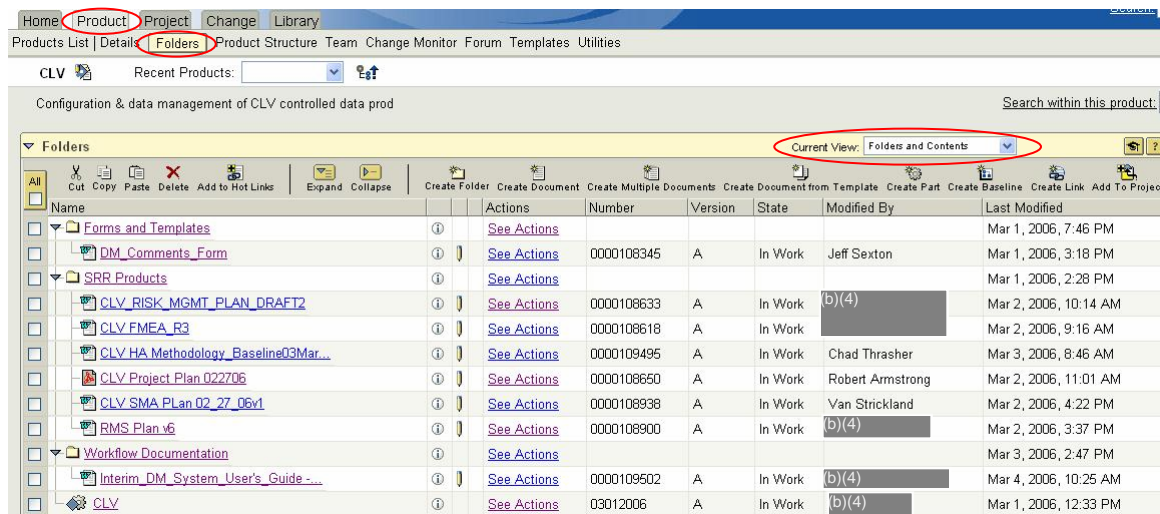
| CDM Role | Windchill Role | Pertinent Pages in this manual |
|------------------------------|----------------|--------------------------------|
| Author | Assignee | 1-10, 20 |
| Receipt and Release | Evaluator | 1-2, 11-12, 18-19 |
| Reviewer | Reviewer | 1-2, 13-14 |
| Change Package Manager (CPM) | Change Admin I | 1-2, 15 |
| Approving Authority | Approver Chair | 1-2, 16-17 |

By using the “Pertinent Pages in this Manual,” it should be easy to focus on the information needed for a specific role.

NOTE: With many Windchill operations, there is more than one way to accomplish the task. For brevity, we usually present one method here. Experienced users may choose to use alternatives.

General Access to Review Documents

Sign on to Windchill. Navigate to the CLV *Product* and click folders, as shown below. Make sure Current View is set to Folders and Contents, as shown below:



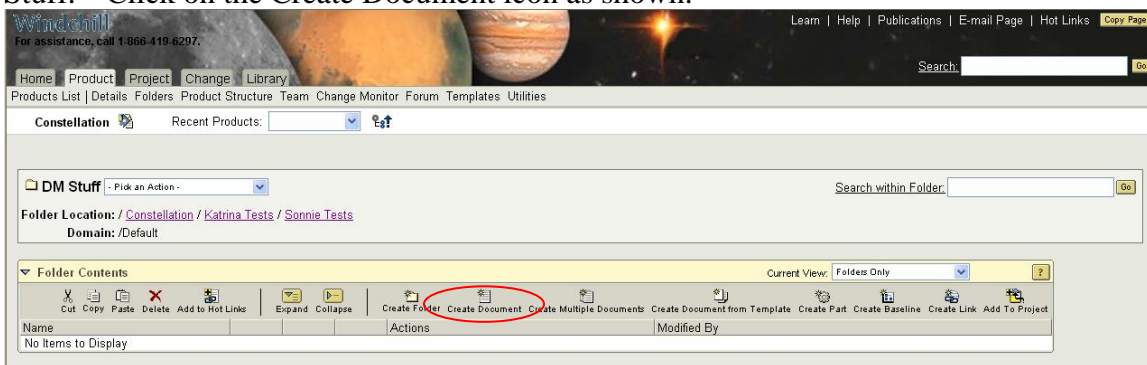
This provides access to the Review Products, Forms and Templates, and Workflow Documentation folders and contents.

CREATE DOCUMENT – AUTHOR

To create a document, begin by logging in to Windchill and clicking the Product tab, as shown. Then click Products List and select CLV. Selecting CLV may not be necessary if CLV is the only Product to which you have access. (NOTE: these screens show Constellation as the Product; for CLV document reviews, the Product will be CLV.)



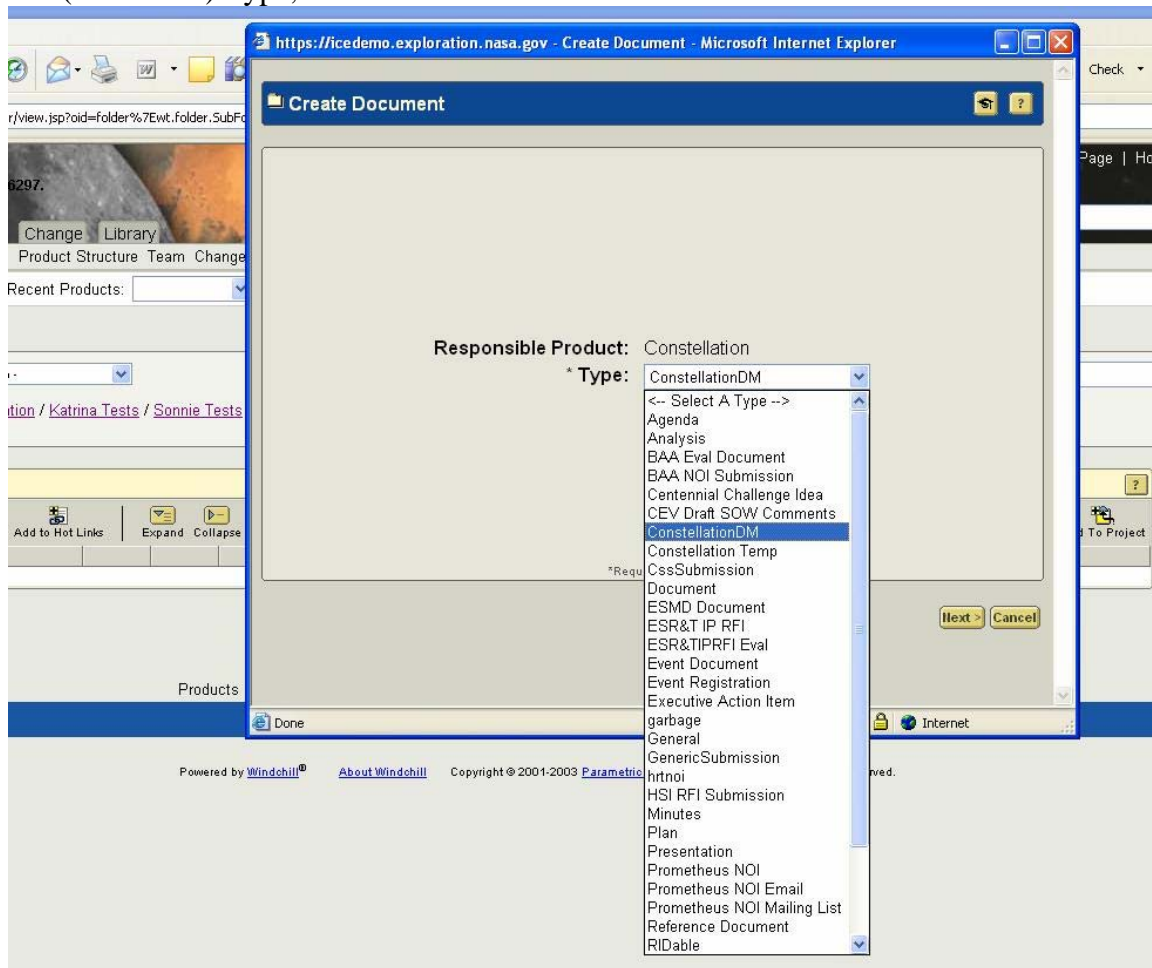
Navigate to the folder where documents for this review will be stored. In this example, the folder is “DM Stuff.” Click on the Create Document icon as shown.



The document to be reviewed should have already been created and should be on your hard drive. Create Document will introduce the document into the Interim DM review process.

CREATE DOCUMENT – AUTHOR (continued)

For (Document) Type, select ConstellationDM as shown below:



CREATE DOCUMENT – AUTHOR (continued)

Click on the Browse button and navigate to the location of the document to be reviewed on your hard drive. Fill in the Name, Title, and Description for this document. Click the Next button at the lower right part of the window.

Create Document

***File:** D:\My Documents\NASA\ESMD\Con **Browse...**

Number: <auto generated>

***Name:** DM_Document_for_Review

Title: DM Document for Review

Description: This document will be used to exercise the DM Review and Approval Process for Cx, CLV, and CEV

Type: ConstellationDM

Responsible Product: Constellation

Location: ☐ Autoselect Folder (/Constellation) ☒ Select Folder **DM Stuff**

***Required fields**

< Back **Next >** **Cancel**

Applet wt/clients/checker/CheckerApplet started Internet

CREATE DOCUMENT – AUTHOR (continued)

Fill in the values for the attributes shown below. Office of Primary Responsibility (OPR), Review Deadline, and Reviewers are mandatory inputs. The remaining inputs are optional, but fill in as many as are known.

The screenshot shows a web browser window with the address bar displaying <https://icedemo.exploration.nasa.gov>. The page title is "Create Document - Microsoft Internet Explorer". The main content area is a form titled "Create Document". The form contains the following fields:

- * Office of Primary Responsibility (OPR): [Text Field]
- * Review Deadline: [Text Field]
- * Reviewers: [Text Field]
- Author: [Text Field]
- Document Date (MMM dd, YYYY): [Text Field]
- Document Number: [Text Field]
- File Paths File Names: [Text Field]
- NASA Center: [Text Field]
- Project: [Text Field]
- Restriction: [Text Field]
- Retention Schedule: [Text Field]

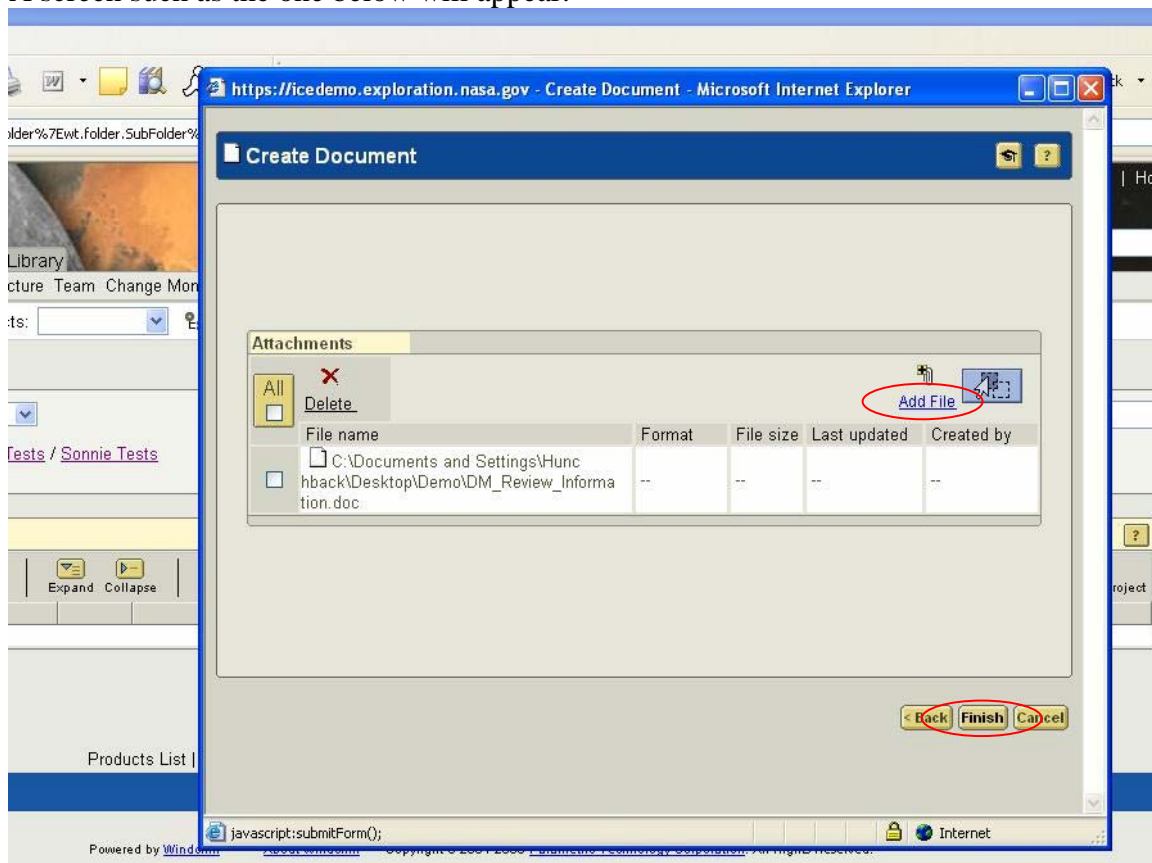
At the bottom right of the form, there are four buttons: "< Back", "Next >", "Finish", and "Cancel". The "Next >" button is circled in red. A small asterisk (*) is visible below the form fields, indicating required fields.

IMPORTANT: For the Reviewers attribute, enter “see attached.” We will use an attached file containing the lists of Mandatory and Optional Reviewers. That file will be attached using the next Windchill screen.

Click the Next button in the lower right when all entries have been made.

CREATE DOCUMENT – AUTHOR (continued)

A screen such as the one below will appear:

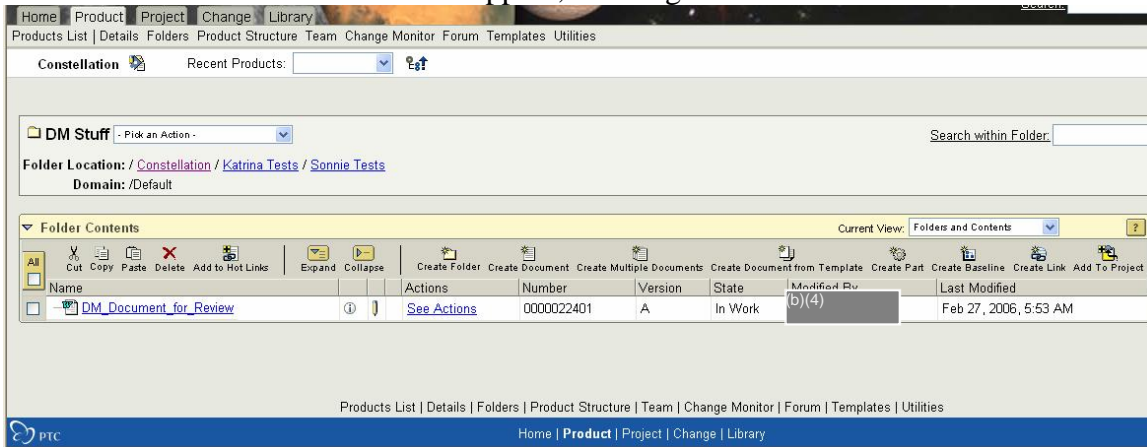


Use the Add File button as shown above to navigate to the file on your hard drive containing the lists of Mandatory and Optional Reviewers. **NOTE: Make sure the file clearly indicates which Reviewers are Mandatory and which are Optional.**

Click the Finish button in the lower right when complete.

CREATE DOCUMENT – AUTHOR (continued)

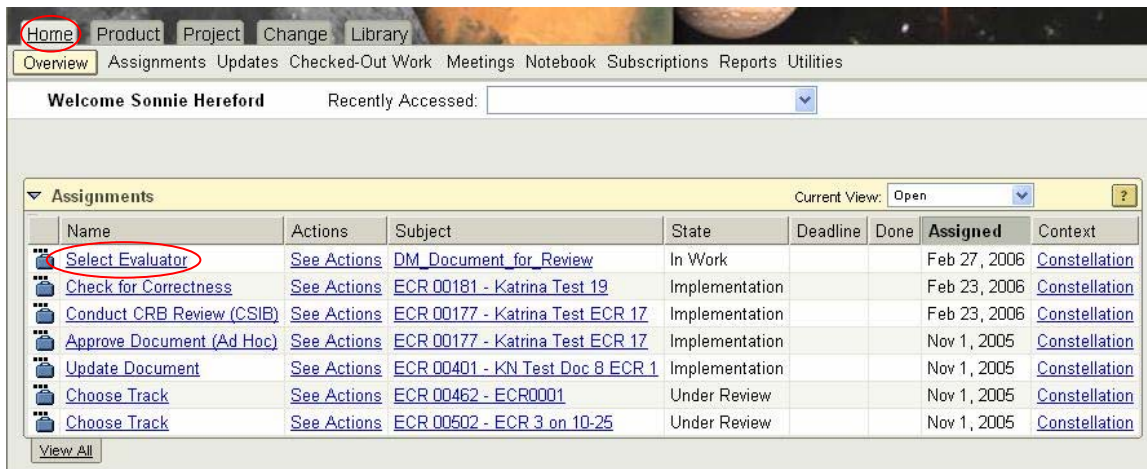
A screen such as the one below will appear, showing the file has been created:



Important: Make sure Folders and Contents is chosen as the Current View as shown above. Otherwise, you will not be able to see the files contained within folders.

SELECT EVALUATOR – AUTHOR

As the Author of a document that has been created, you will receive an assignment e-mail from Windchill to Select the Evaluator. In CLV, Evaluator is referred to as the Receipt and Release role. You may click the assignment link in the e-mail to access your assignment. Alternatively, from your Windchill Home tab, click the Select Evaluator assignment, as shown below:



The screenshot shows the Windchill Home page. The top navigation bar includes tabs: Home (circled in red), Product, Project, Change, and Library. Below this is a secondary navigation bar with links: Overview, Assignments, Updates, Checked-Out Work, Meetings, Notebook, Subscriptions, Reports, and Utilities. The main content area displays a welcome message for 'Sonnie Hereford' and a 'Recently Accessed' dropdown. The 'Assignments' section is expanded, showing a table of tasks. The first task, 'Select Evaluator', is circled in red. The table has columns: Name, Actions, Subject, State, Deadline, Done, Assigned, and Context.

| Name | Actions | Subject | State | Deadline | Done | Assigned | Context |
|---------------------------|-----------------------------|-------------------------------------------------|----------------|----------|------|--------------|-------------------------------|
| Select Evaluator | See Actions | DM Document for Review | In Work | | | Feb 27, 2006 | Constellation |
| Check for Correctness | See Actions | ECR 00181 - Katrina Test 19 | Implementation | | | Feb 23, 2006 | Constellation |
| Conduct CRB Review (CSIB) | See Actions | ECR 00177 - Katrina Test ECR 17 | Implementation | | | Feb 23, 2006 | Constellation |
| Approve Document (Ad Hoc) | See Actions | ECR 00177 - Katrina Test ECR 17 | Implementation | | | Nov 1, 2005 | Constellation |
| Update Document | See Actions | ECR 00401 - KN Test Doc 8 ECR 1 | Implementation | | | Nov 1, 2005 | Constellation |
| Choose Track | See Actions | ECR 00462 - ECR0001 | Under Review | | | Nov 1, 2005 | Constellation |
| Choose Track | See Actions | ECR 00502 - ECR 3 on 10-25 | Under Review | | | Nov 1, 2005 | Constellation |

View All

Through either method, a screen such as the following will appear:

SELECT EVALUATOR – AUTHOR (continued)

Select Evaluator

Instructions: 1) Select the Evaluator. This person will perform the Receipt and Release role. He / she will:


- Review the document for format and completeness
- Assign Reviewers, Change Admin I (the CPM), and the Approver Chair (Approving Authority)
- Set the Suspense Date, which is the date by which Reviewers should complete the review

2) Complete the task by clicking the "Task Complete" button

Process Initiator: (b)(4) **Priority:** Highest

Assignee: **Due Date:**

Role: Assignee **Process:** ICE - Constellation DM_0000022401 - DM_Document_for_Review A

 ConstellationDM_0000022401 - DM_Document_for_Review A

Task Complete

Discussion Forum

Notebook

Task Content

Role: Evaluator

Groups **Users** Organizations

Source: gov.nasa.nis.Ldap

User Name: sonnie* Find

User ID:

Group:

| User Name | User ID | Source |
|-----------|---------|--------|
| (b)(4) | | |

Participants:

| Principal | Source |
|-----------|--------|
| sherefor | (b)(4) |

Add >>
Add All >>
<< Remove
<< Remove All

Save Reset Help

In the applet at the bottom of the screen, set the Role pull-down to Evaluator. Select the Users tab. Enter the User Name of the person who will fill the Evaluator role. You may enter the first name (or the first part of it) with an asterisk at the end, as shown. You may also enter an asterisk followed by the last name. You may also enter the first and last names. In any case, after clicking the Find button, all users matching the criterion will be displayed. Select the one you want and click Add. The selected name will appear in the Participants box.

NOTE: It is important to click save after your selection has been made. Otherwise, the selection will not be retained when this window is exited. Complete this assignment by clicking the Task Complete button.

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RECEIPT AND RELEASE AND SET REVIEW DEADLINE – EVALUATOR

As the Evaluator (Receipt and Release Role), you will receive an assignment e-mail from Windchill to perform the Receipt and Release task and set the Review Deadline. You may click the assignment link in the e-mail to access your assignment. Alternatively, from your Windchill Home tab, click the Receipt and Release and Set Review Deadline assignment, as shown below:

The screenshot shows the Windchill Home page with a navigation bar at the top containing links: Home, Product, Project, Change, Library, Overview, Assignments, Updates, Checked-Out Work, Meetings, Notebook, Subscriptions, Reports, Utilities. Below the navigation bar is a 'Welcome (b)(4)' message and a 'Recently Accessed:' dropdown. A 'Search' button is located on the right. The main content area is titled 'Assignments' and includes a 'Current View: Open' dropdown. Below this is a table with the following columns: Name, Actions, Subject, State, Deadline, Done, Assigned, and Context. The table lists several assignments, including 'Receipt and Release and Set Review Deadline', 'Check for Correctness', 'Conduct CRB Review (CSIB)', 'Approve Document (Ad Hoc)', 'Update Document', 'Choose Track', and 'Choose Track'. Each row has a 'See Actions' link and a 'Context' link. A 'View All' button is located at the bottom left of the table.

| Name | Actions | Subject | State | Deadline | Done | Assigned | Context |
|-------------------------------------------------------------|-----------------------------|-------------------------------------------------|----------------|----------|------|--------------|-------------------------------|
| Receipt and Release and Set Review Deadline | See Actions | DM_Document_for_Review | In Work | | | Feb 27, 2006 | Constellation |
| Check for Correctness | See Actions | ECR 00181 - Katrina Test 19 | Implementation | | | Feb 23, 2006 | Constellation |
| Conduct CRB Review (CSIB) | See Actions | ECR 00177 - Katrina Test ECR 17 | Implementation | | | Feb 23, 2006 | Constellation |
| Approve Document (Ad Hoc) | See Actions | ECR 00177 - Katrina Test ECR 17 | Implementation | | | Nov 1, 2005 | Constellation |
| Update Document | See Actions | ECR 00401 - KN Test Doc 8 ECR 1 | Implementation | | | Nov 1, 2005 | Constellation |
| Choose Track | See Actions | ECR 00462 - ECR0001 | Under Review | | | Nov 1, 2005 | Constellation |
| Choose Track | See Actions | ECR 00502 - ECR 3 on 10-25 | Under Review | | | Nov 1, 2005 | Constellation |

Through either method, a screen such as the following will appear:

The screenshot shows the 'Receipt and Release and Set Review Deadline' form. It includes a title bar, a 'Process Initiator: (b)(4)' field, a 'Priority: Highest' label, a 'Due Date:' label, and a 'Process: ICE - Constellation DM_0000022401 - DM_Document_for_Review A' label. Below these is a 'Suspense Date: 02/28/2006' field and a 'Rework Comments:' section. A 'Task Complete' button is located at the bottom right. The form also includes a 'Discussion Forum' section, a 'Notebook' section, and a 'Task Content' section. At the bottom, there is a 'Role: Reviewer' dropdown, a 'Groups' section with 'Users' and 'Organizations' tabs, and a 'Participants' section with a table for 'Principal' and 'Source'.

Instructions: Please perform the following tasks:

- 1) Review the document for format and completeness
- 2) Assign Reviewers, Change Admin I (the CPM), and the Approver Chair (Approving Authority)
- 3) Set the Suspense Date (mm/dd/yyyy), which is the date by which Reviewers should complete the review
- 4) Complete the task by clicking the "Task Complete" button

Process Initiator: (b)(4) **Priority:** Highest

Assignee: **Due Date:**

Role: Evaluator **Process:** ICE - Constellation DM_0000022401 - DM_Document_for_Review A

***Suspense Date:** 02/28/2006

Rework Comments:

Task Complete

Role: Reviewer

Groups: **Users:** **Organizations:**

Source: gov.nasa.nis.Ldap
User Name: sonnie*
User ID:
Group:
User Name: (b)(4)
User ID:
Source:

Participants:

| Principal | Source |
|-----------------|--------|
| sherefor (b)(4) | |

Save **Reset** **Help**

Access the document being reviewed by clicking the document link, as shown above. Review the document for format and completeness. This is not a technical review.

RECEIPT AND RELEASE AND SET REVIEW DEADLINE – EVALUATOR (continued)

Assign the Reviewers, Change Admin I [Change Package Manager (CPM)], and Approver Chair (Approving Authority) by using the following steps. In the applet at the bottom of the screen, set the Role pull-down to Reviewer. Select the Users tab. Enter the User Name of the first person who will fill the Reviewer role. You may enter the first name (or the first part of it) with an asterisk at the end, as shown. You may also enter an asterisk followed by the last name. You may also enter the first and last names. In any case, after clicking the Find button, all users matching the criterion will be displayed. Select the one you want and click Add. The selected name will appear in the Participants box. Repeat the name entry and “find” for all desired Reviewers. **NOTE: Mandatory Reviewers are entered in the same manner as Optional Reviewers.** Repeat the above process for the Change Admin I role and for the Approver Chair role. **NOTE: It is important to click save after all selections have been made. Otherwise, the selections will not be retained when this window is exited.** Finally, set the Suspense Date, which is the date by which each Reviewer is asked to complete his/her review assignment. The format for this date is MM/DD/YYYY. Complete this assignment by clicking the Task Complete button.

Receipt and Release and Set Review Deadline

Instructions:

Please perform the following tasks:
1) Review the document for format and completeness
2) Assign Reviewers, Change Admin I (the CPM), and the Approver Chair (Approving Authority)
3) Set the Suspense Date (mm/dd/yyyy), which is the date by which Reviewers should complete the review
4) Complete the task by clicking the "Task Complete" button

Process Initiator:

Assignee:

Role:

Evaluator


Priority:

Highest

Due Date:

Process:

ICE - Constellation DM_0000022401 - DM_Document_for_Review A

 ConstellationDM_0000022401 - DM_Document_for_Review A

*Suspense Date:

02/28/2008

Rework Comments:

Task Complete

Discussion Forum

Notebook

Task Content

Role:

Reviewer

Groups

Users

Organizations

Source

gov.nasa.nis.Ldep

User Name:

sonnie*

User ID:

Group:

Find

Add >>

Add All >>

<< Remove

<< Remove All

| User Name | User ID | Source |
|-----------|---------|--------|
| (b)(4) | | |

Participants:

| Principal | Source |
|-----------|--------|
| sherefor | (b)(4) |

Save

Reset

Help

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REVIEW DOCUMENT – REVIEWER

When you are selected to review a document, you will receive a Review Document assignment e-mail from Windchill. You may click the assignment link in the e-mail to access your assignment. Alternatively, from your Windchill Home tab, click the Review Document assignment, as shown below:

The screenshot shows the Windchill Home page with a navigation bar at the top containing links: Home, Product, Project, Change, Library, Overview, Assignments, Updates, Checked-Out Work, Meetings, Notebook, Subscriptions, Reports, and Utilities. Below the navigation bar, there is a 'Welcome' message and a 'Recently Accessed' dropdown menu. The main section is titled 'Assignments' and includes a 'Current View' dropdown set to 'Open'. A table lists several assignments with columns for Name, Actions, Subject, State, Deadline, Done, Assigned, and Context. The assignments include 'Review Document', 'Check for Correctness', 'Conduct CRB Review (CSIB)', 'Approve Document (Ad Hoc)', 'Update Document', 'Choose Track', and another 'Choose Track' entry. Each row has a 'See Actions' link and a 'Context' link.

| Name | Actions | Subject | State | Deadline | Done | Assigned | Context |
|-------------------------------------------|-----------------------------|-------------------------------------------------|----------------|----------|------|--------------|-------------------------------|
| Review Document | See Actions | DM_Document_for_Review | In Work | | | Feb 27, 2006 | Constellation |
| Check for Correctness | See Actions | ECR 00181 - Katrina Test 19 | Implementation | | | Feb 23, 2006 | Constellation |
| Conduct CRB Review (CSIB) | See Actions | ECR 00177 - Katrina Test ECR 17 | Implementation | | | Feb 23, 2006 | Constellation |
| Approve Document (Ad Hoc) | See Actions | ECR 00177 - Katrina Test ECR 17 | Implementation | | | Nov 1, 2005 | Constellation |
| Update Document | See Actions | ECR 00401 - KN Test Doc 8 ECR 1 | Implementation | | | Nov 1, 2005 | Constellation |
| Choose Track | See Actions | ECR 00462 - ECR0001 | Under Review | | | Nov 1, 2005 | Constellation |
| Choose Track | See Actions | ECR 00502 - ECR 3 on 10-25 | Under Review | | | Nov 1, 2005 | Constellation |

Through either method, a screen such as the following will appear:

The screenshot shows the 'Review Document' task screen. It includes instructions for the reviewer, process initiator and assignee information, and a document link. The document link is highlighted with a red box and the text '(Document link)'. Below the document link is a 'Task Complete' button. At the bottom of the screen, there is a 'Discussion Forum' and a 'Notebook' section. The 'Notebook' section contains a table with columns for Name, Modified, and To-Do, and a list of actions: Add File, Add URL, Remove, Replace, Get, and Properties. There are also 'Save' and 'Reset' buttons at the bottom.

Review Document

Instructions: Please perform the following tasks:

- 1) Review the document.
- 2) Download the DM Comments Form using [this link](#) and save the form to your hard drive.
- 3) Rename the DM Comments Form to include your first initial and last name at the end, e.g. DM_Comments_Form_S_Hereford.doc.
- 4) Enter your comments into the DM Comments Form.
- 5) Attach the DM Comments Form using the "Add File" button in the applet below.
- 6) Complete the task by clicking the "Task Complete" button.

Process Initiator: b(4) **Priority:** Highest

Assignee: [Redacted] **Due Date:**

Role: Reviewer **Process:** ICE - Constellation DM_0000022401 - DM_Document_for_Review A

[ConstellationDM_0000022401 - DM_Document_for_Review A](#)

(Document link)

[Task Complete](#)

Discussion Forum

Notebook

| Name | Modified | To-Do |
|-------------------------|-----------------|-------|
| DM_Comments_Form_S_Here | 2/27/06 6:35 AM | |

[Add File](#)
[Add URL](#)
[Remove](#)
[Replace](#)
[Get](#)
[Properties](#)

[Save](#) [Reset](#)

Access the document by clicking the document link, as shown above. Download the DM Comments form using the link in line 2 of the instructions. Save the form to your hard drive then rename the form to include your

REVIEW DOCUMENT – REVIEWER (continued)

first initial and last name, e.g. DM_Comments_Form_S_Hereford.doc. Enter your review comments into this form. When comments are complete, attach the form using the Add File button in the applet in the lower part of the screen. **NOTE: Remember to click the Save button at the bottom of the applet, or the file will not actually be added.** Complete this assignment by clicking the Task Complete button.

NOTE: In order to see if you are a Mandatory or Optional Reviewer, click the document link in the above screen. A screen such as the following will appear:

DM_Document_for_Review View [Go]

Description for DM Doc

Responsible Product: Constellation
Number: 000022442
Name: DM_Document_for_Review
Title: DM Doc
Version: A.2
Type: ConstellationDM
Status: Checked in
Team: 000022442 - DM_Document_for_Review A19263
State: In Work - Under Review - Released
Location: ... / Katrina Tests / Sonnie Tests / DM Stuff

Primary: DM_Document_for_Review.doc
Format: Microsoft Word
File Size: 22.0 KB
Last Updated: 2006-03-01 16:43:43 GMT
Created By: (b)(4)
Created: 2006-03-01 16:43:41 GMT
Updated By: (b)(4)
Last Updated: 2006-03-02 19:06:22 GMT

Author: Mark Ogles
Document Number:
NASA Center: MSFC
Project: CLV
Retention Schedule:
Reviewers: see attachment

Document Date (MMM dd, YYYY):
File Paths File Names:
Office of Primary Responsibility (OPR): CLV - First Stage
Restriction:
Review Deadline: 03/02/2006

Related Parts

| Name | Actions | Number | Version | Context | Type | Association | Life Cycle | Team | L |
|---------------------|---------|--------|---------|---------|------|-------------|------------|------|---|
| No Items to Display | | | | | | | | | |

Attachments

Click the Attachments link, as shown above. A screen such as the following will appear:

DM_Document_for_Review View [Go]

Description for DM Doc

Responsible Product: Constellation
Number: 000022442
Name: DM_Document_for_Review
Title: DM Doc
Version: A.2
Type: ConstellationDM
Status: Checked in
Team: 000022442 - DM_Document_for_Review A19263
State: In Work - Under Review - Released
Location: ... / Katrina Tests / Sonnie Tests / DM Stuff

Primary: DM_Document_for_Review.doc
Format: Microsoft Word
File Size: 22.0 KB
Last Updated: 2006-03-01 16:43:43 GMT
Created By: (b)(4)
Created: 2006-03-01 16:43:41 GMT
Updated By: (b)(4)
Last Updated: 2006-03-02 19:06:22 GMT

Author: Mark Ogles
Document Number:
NASA Center: MSFC
Project: CLV
Retention Schedule:
Reviewers: see attachment

Document Date (MMM dd, YYYY):
File Paths File Names:
Office of Primary Responsibility (OPR): CLV - First Stage
Restriction:
Review Deadline: 03/02/2006

Attachments

| File name | Format | File size | Last modified | Created by |
|--------------------------------|-----------|-----------|-------------------------|------------|
| CLV Project Plan Reviewers.ttf | Rich Text | 1.42 KB | 2006-03-02 19:04:45 GMT | (b)(4) |

Click the document link in the Attachment box, as shown above. This will display the file showing the Mandatory and Optional Reviewers. You may return to your assignment by using the Home tab in the upper left corner of the Windchill screen, and then clicking the link to your assignment.

CONSOLIDATE COMMENTS AND UPDATE DOCUMENT – CHANGE ADMIN I

As the Change Admin I [Change Package Manager (CPM)], you will receive a Consolidate Comments and Update Document assignment e-mail from Windchill. You may click the assignment link in the e-mail to access your assignment. Alternatively, from your Windchill Home tab, click the Consolidate Comments and Update Document assignment, as shown below:

The screenshot shows the Windchill Home page with the following elements:

- Navigation tabs: Home, Product, Project, Change, Library
- Sub-navigation tabs: Overview, Assignments, Updates, Checked-Out Work, Meetings, Notebook, Subscriptions, Reports, Utilities
- Welcome message: Welcome b(4)
- Recently Accessed: [Dropdown menu]
- Search with [Text input]
- Assignments section with a table of tasks.

| Name | Actions | Subject | State | Deadline | Done | Assigned | Context |
|------------------------------------------|-----------------------------|-------------------------------------------------|----------------|----------|------|--------------|-------------------------------|
| Consolidate Comments and Update Document | See Actions | DM_Document_for_Review | In Work | | | Feb 27, 2006 | Constellation |
| Check for Correctness | See Actions | ECR 00181 - Katrina Test 19 | Implementation | | | Feb 23, 2006 | Constellation |
| Conduct CRB Review (CSIB) | See Actions | ECR 00177 - Katrina Test ECR 17 | Implementation | | | Feb 23, 2006 | Constellation |
| Approve Document (Ad Hoc) | See Actions | ECR 00177 - Katrina Test ECR 17 | Implementation | | | Nov 1, 2005 | Constellation |
| Update Document | See Actions | ECR 00401 - KN Test Doc 8 ECR 1 | Implementation | | | Nov 1, 2005 | Constellation |
| Choose Track | See Actions | ECR 00462 - ECR0001 | Under Review | | | Nov 1, 2005 | Constellation |
| Choose Track | See Actions | ECR 00502 - ECR 3 on 10-25 | Under Review | | | Nov 1, 2005 | Constellation |

View All

Through either method, a screen such as the following will appear:

The screenshot shows the "Consolidate Comments and Update Document" task screen with the following elements:

- Instructions:** 1) Please consolidate the Reviewers' comments and update the document accordingly
2) Complete the task by clicking the "Task Complete" button
- Process Initiator:** [Sonnie Hereford](#) **Priority:** Highest
- Assignee:** [Sonnie Hereford](#) **Due Date:**
- Role:** Change Admin I **Process:** [ICE - Constellation DM_0000022401 - DM_Document_for_Review A](#)
- Task title: [ConstellationDM_0000022401 - DM_Document_for_Review A](#)
- Task Complete** button
- Discussion Forum** section
- Notebook** section with a table and buttons.

| Name | Modified | To-Do |
|-------------------------|-----------------|-------|
| DM_Comments_Form_S_Here | 2/27/06 6:35 AM | |

Buttons: Add File, Add URL, Remove, Replace, Get, Properties, Save, Reset

All comment forms will be displayed in the applet in the lower left of the screen above. Any comment form may be accessed by selecting it and clicking the Get button. To update the document being reviewed, click the Check Out and Edit icon as shown above. Save the document to your hard drive. After all edits are complete, check the document back in. Complete this assignment by clicking the Task Complete button.

DOCUMENT DISPOSITION – APPROVING AUTHORITY

As the Approver Chair (Approving Authority), you will receive a Document Disposition assignment e-mail from Windchill. You may click the assignment link in the e-mail to access your assignment. Alternatively, from your Windchill Home tab, click the Document Disposition assignment, as shown below:

The screenshot shows the Windchill Home page with a navigation bar at the top containing links: Home, Product, Project, Change, Library, Overview, Assignments, Updates, Checked-Out Work, Meetings, Notebook, Subscriptions, Reports, and Utilities. Below the navigation bar, there is a 'Welcome (b)(4)' message and a 'Recently Accessed:' dropdown menu. The main content area is titled 'Assignments' and includes a 'Current View: Open' dropdown. A table lists several assignments with columns for Name, Actions, Subject, State, Deadline, Done, Assigned, and Context. The assignments include 'Document Disposition', 'Check for Correctness', 'Conduct CRB Review (CSIB)', 'Approve Document (Ad Hoc)', 'Update Document', 'Choose Track', and another 'Choose Track' entry. Each row has a 'See Actions' link and a 'Context' link.

| Name | Actions | Subject | State | Deadline | Done | Assigned | Context |
|-------------------------------------------|-----------------------------|-------------------------------------------------|----------------|----------|------|--------------|-------------------------------|
| Document Disposition | See Actions | DM_Document_for_Review | In Work | | | Feb 27, 2006 | Constellation |
| Check for Correctness | See Actions | ECR 00181 - Katrina Test 19 | Implementation | | | Feb 23, 2006 | Constellation |
| Conduct CRB Review (CSIB) | See Actions | ECR 00177 - Katrina Test ECR 17 | Implementation | | | Feb 23, 2006 | Constellation |
| Approve Document (Ad Hoc) | See Actions | ECR 00177 - Katrina Test ECR 17 | Implementation | | | Nov 1, 2005 | Constellation |
| Update Document | See Actions | ECR 00401 - KN Test Doc 8 ECR 1 | Implementation | | | Nov 1, 2005 | Constellation |
| Choose Track | See Actions | ECR 00462 - ECR0001 | Under Review | | | Nov 1, 2005 | Constellation |
| Choose Track | See Actions | ECR 00502 - ECR 3 on 10-25 | Under Review | | | Nov 1, 2005 | Constellation |

Through either method, a screen such as the following will appear:

The screenshot shows the 'Document Disposition' task screen. It includes instructions for the user to review the document and select a choice. The screen displays the process initiator as (b)(4) and the priority as Highest. The assignee is (b)(4) and the role is Approver Chair. The due date is not specified. The process is ICE - Constellation DM_0000022401 - DM_Document_for_Review A. A link to the document is provided: ConstellationDM 0000022401 - DM_Document_for_Review A. Below this, there is a 'Rework Comments:' text area. Four radio buttons are available for selection: 'Approved Ready for Release', 'Approved - Ready for CMII', 'Rework - Return to Evaluator' (which is selected), and 'Hold'. A 'Task Complete' button is located at the bottom right. At the bottom of the screen, there is a table showing the file name, format, file size, last updated date, and updated by user.

| File Name | Format | File Size | Last Updated | Updated By |
|-----------------------------------------|----------------|-----------|-------------------------|------------|
| DM_Comments_Form_(b)(4) | Microsoft Word | 53.5 KB | 2006-02-27 06:35:18 CST | (b)(4) |

You may access the document being reviewed by clicking the document link as shown above. After reviewing the document, select the correct radio button indicating the document disposition is:

DOCUMENT DISPOSITION – APPROVING AUTHORITY (continued)

- Approved – Ready for Release
- Approved – Ready to be Placed in the CMII review process
- Rework – Return to Receipt and Release
- Hold – Have the author wait until further notice

NOTE: If the Rework option is chosen, you are required to enter comments explaining why the document is being sent back for rework. Otherwise the following two screens will be displayed, and you'll be required to enter the Rework Comments on the second one.

| Name | Actions | Subject | State | Deadline | Done | Assigned | Context |
|----------------------------------------------|-----------------------------|-------------------------------------------------|----------------|----------|------|--------------|-------------------------------|
| Please Enter Rework Comments | See Actions | DM_Document_for_Review | In Work | | | Feb 27, 2006 | Constellation |
| Check for Correctness | See Actions | ECR 00181 - Katrina Test 19 | Implementation | | | Feb 23, 2006 | Constellation |
| Conduct CRB Review (CSIR) | See Actions | ECR 00177 - Katrina Test ECR 17 | Implementation | | | Feb 23, 2006 | Constellation |
| Approve Document (Ad Hoc) | See Actions | ECR 00177 - Katrina Test ECR 17 | Implementation | | | Nov 1, 2005 | Constellation |
| Update Document | See Actions | ECR 00401 - KN Test Doc 8 ECR 1 | Implementation | | | Nov 1, 2005 | Constellation |
| Choose Track | See Actions | ECR 00462 - ECR0001 | Under Review | | | Nov 1, 2005 | Constellation |
| Choose Track | See Actions | ECR 00502 - ECR 3 on 10-25 | Under Review | | | Nov 1, 2005 | Constellation |

Please Enter Rework Comments

Instructions: You MUST enter rework comments if you have requested the Rework option!

Process Initiator: (b)(4) **Priority:** Highest

Assignee: (b)(4) **Due Date:**

Role: Approver Chair **Process:** ICE - Constellation DM_0000022401 - DM_Document_for_Review A

Rework Comments: This document needs rework

Task Complete

| File Name | Format | File Size | Last Updated | Updated By |
|-------------------------|----------------|-----------|-------------------------|------------|
| DM_Comments_Form_(b)(4) | Microsoft Word | 53.5 KB | 2006-02-27 06:35:18 CST | (b)(4) |

[Task Content](#)
[Discussion Forum](#)
[Notebook](#)

Complete this assignment by clicking the Task Complete button.

RELEASE VERIFICATION – EVALUATOR

As the Evaluator (Receipt and Release Role), you may receive a Release Verification assignment e-mail from Windchill. You may click the assignment link in the e-mail to access your assignment. Alternatively, from your Windchill Home tab, click the Release Verification assignment, as shown below:

The screenshot shows the Windchill Home page with a navigation bar at the top containing links: Home, Product, Project, Change, Library, Overview, Assignments, Updates, Checked-Out Work, Meetings, Notebook, Subscriptions, Reports, and Utilities. Below the navigation bar, there is a 'Welcome (b)(4)' message and a 'Recently Accessed:' dropdown menu. The main content area is titled 'Assignments' and includes a 'Current View: Open' dropdown. A table lists several assignments with columns for Name, Actions, Subject, State, Deadline, Done, Assigned, and Context. The assignments include 'Release Verification', 'Review Document', 'Check for Correctness', 'Conduct CRB Review (CSIB)', 'Approve Document (Ad Hoc)', 'Update Document', and 'Choose Track'. Each assignment has a 'See Actions' link and a 'Context' link. A 'View All' button is located at the bottom left of the table.

| Name | Actions | Subject | State | Deadline | Done | Assigned | Context |
|-------------------------------------------|-----------------------------|-------------------------------------------------|----------------|----------|------|--------------|-------------------------------|
| Release Verification | See Actions | DM_Document_for_Review | In Work | | | Feb 28, 2006 | Constellation |
| Review Document | See Actions | DM_Document_for_Review | In Work | | | Feb 28, 2006 | Constellation |
| Check for Correctness | See Actions | ECR 00181 - Katrina Test 19 | Implementation | | | Feb 23, 2006 | Constellation |
| Conduct CRB Review (CSIB) | See Actions | ECR 00177 - Katrina Test ECR 17 | Implementation | | | Feb 23, 2006 | Constellation |
| Approve Document (Ad Hoc) | See Actions | ECR 00177 - Katrina Test ECR 17 | Implementation | | | Nov 1, 2005 | Constellation |
| Update Document | See Actions | ECR 00401 - KN Test Doc 8 ECR 1 | Implementation | | | Nov 1, 2005 | Constellation |
| Choose Track | See Actions | ECR 00462 - ECR0001 | Under Review | | | Nov 1, 2005 | Constellation |

Through either method, a screen such as the following will appear:

The screenshot shows the 'Release Verification' task screen. It includes instructions for the evaluator: 1) Review the document for format and completeness, 2) Release the document into the appropriate library (or other location), and 3) Complete the task by clicking the 'Task Complete' button. The screen also displays the process initiator (b)(4), priority (Highest), assignee (b)(4), due date, role (Evaluator), and process (ICE - Constellation DM_0000022401 - DM_Document_for_Review A). A document link is provided: ConstellationDM_0000022401 - DM_Document_for_Review A. A 'Task Complete' button is located at the bottom right. Below the task information, there is a table showing the file details.

| File Name | Format | File Size | Last Updated | Updated By |
|------------------------------------------|----------------|-----------|-------------------------|------------|
| DM_Comments_Form_ (b)(4) | Microsoft Word | 53.5 KB | 2006-02-27 06:35:18 CST | (b)(4) |

Task Content
Discussion Forum
Notebook

You may access the document by clicking the document link, as shown above. Review the document for format and completeness. Move the document to the appropriate library or other location. Complete this assignment by clicking the Task Complete button.

RELEASE CMII – EVALUATOR

As the Evaluator (Receipt and Release Role), you may receive a Release CMII assignment e-mail from Windchill. You may click the assignment link in the e-mail to access your assignment. Alternatively, from your Windchill Home tab, click the Release CMII assignment, as shown below:

Home Product Project Change Library

Overview Assignments Updates Checked-Out Work Meetings Notebook Subscriptions Reports Utilities

Welcome (b)(4) Recently Accessed: [dropdown]

Assignments Current View: Open [dropdown] [?]

| Name | Actions | Subject | State | Deadline | Done | Assigned | Context |
|-------------------------------------------|-----------------------------|-------------------------------------------------|----------------|----------|------|--------------|-------------------------------|
| Release CMII | See Actions | DM_Document_for_Review | In Work | | | Feb 28, 2006 | Constellation |
| Check for Correctness | See Actions | ECR 00181 - Katrina Test 19 | Implementation | | | Feb 23, 2006 | Constellation |
| Conduct CRB Review (CSIB) | See Actions | ECR 00177 - Katrina Test ECR 17 | Implementation | | | Feb 23, 2006 | Constellation |
| Approve Document (Ad Hoc) | See Actions | ECR 00177 - Katrina Test ECR 17 | Implementation | | | Nov 1, 2005 | Constellation |
| Update Document | See Actions | ECR 00401 - KN Test Doc 8 ECR 1 | Implementation | | | Nov 1, 2005 | Constellation |
| Choose Track | See Actions | ECR 00462 - ECR0001 | Under Review | | | Nov 1, 2005 | Constellation |
| Choose Track | See Actions | ECR 00502 - ECR 3 on 10-25 | Under Review | | | Nov 1, 2005 | Constellation |

[View All](#)

Through either method, a screen such as the following will appear:

Release CMII

Instructions: 1) Review the document for format and completeness
2) Send the document to the CMII Process
3) Complete the task by clicking the "Task Complete" button

Process Initiator: (b)(4) **Priority:** Highest

Assignee: [redacted] **Due Date:**

Role: Evaluator **Process:** ICE - Constellation DM_0000022422 - DM_Document_for_Review A

[ConstellationDM 0000022422 - DM_Document_for_Review A](#)

[Task Complete](#)

| File Name | Format | File Size | Last Updated | Updated By |
|------------------------------------------|----------------|-----------|-------------------------|------------|
| DM_Comments_Form_ (b)(4) | Microsoft Word | 53.5 KB | 2006-02-28 14:34:28 CST | (b)(4) |

Task Content
Discussion Forum
Notebook

You may access the document by clicking the document link, as shown above. Review the document for format and completeness. Move the document to the appropriate location to begin CMII processing. Complete this assignment by clicking the Task Complete button.

HOLD – AUTHOR

As the Document Author, you may receive a Hold assignment e-mail from Windchill. You may click the assignment link in the e-mail to access your assignment. Alternatively, from your Windchill Home tab, click the Hold assignment, as shown below:

Home Product Project Change Library

Overview Assignments Updates Checked-Out Work Meetings Notebook Subscriptions Reports Utilities

Welcome (b)(4) Recently Accessed: [dropdown]

Assignments Current View: Open [dropdown] [?]

| Name | Actions | Subject | State | Deadline | Done | Assigned | Context |
|---------------------------|-----------------------------|-------------------------------------------------|----------------|----------|------|--------------|-------------------------------|
| Hold | See Actions | DM_Document_for_Review | In Work | | | Feb 28, 2006 | Constellation |
| Check for Correctness | See Actions | ECR 00181 - Katrina Test 19 | Implementation | | | Feb 23, 2006 | Constellation |
| Conduct CRB Review (CSIB) | See Actions | ECR 00177 - Katrina Test ECR 17 | Implementation | | | Feb 23, 2006 | Constellation |
| Approve Document (Ad Hoc) | See Actions | ECR 00177 - Katrina Test ECR 17 | Implementation | | | Nov 1, 2005 | Constellation |
| Update Document | See Actions | ECR 00401 - KN Test Doc 8 ECR 1 | Implementation | | | Nov 1, 2005 | Constellation |
| Choose Track | See Actions | ECR 00462 - ECR0001 | Under Review | | | Nov 1, 2005 | Constellation |
| Choose Track | See Actions | ECR 00502 - ECR 3 on 10-25 | Under Review | | | Nov 1, 2005 | Constellation |

[View All](#)

Through either method, a screen such as the following will appear:

Hold

Instructions: 1) This document is on hold until further notice.
2) Please place the document in the appropriate Windchill location.
3) Complete the task by clicking the "Task Complete" button.

Process Initiator: (b)(4) **Priority:** Highest

Assignee: [redacted] **Due Date:**

Role: Assignee **Process:** [ICE - Constellation DM_0000022423 - DM_Document_for_Review A](#)

[ConstellationDM 0000022423 - DM_Document_for_Review A](#)

[Task Complete](#)

| File Name | Format | File Size | Last Updated | Updated By |
|-----------------------------------------|----------------|-----------|-------------------------|------------|
| DM_Comments_Form (b)(4) | Microsoft Word | 53.5 KB | 2006-02-28 14:46:39 CST | (b)(4) |

Task Content
Discussion Forum
Notebook

Place the document in a location to be held until further notice. Complete this assignment by clicking the Task Complete button.